

Shared: Group Configurations for Employees

Setup Guide

Last Revised: May 6 2015

Applies to these SAP Concur solutions:

- Expense
 - Professional/Premium edition
 - Standard edition

- Travel
 - Professional/Premium edition
 - Standard edition

- Invoice
 - Professional/Premium edition
 - Standard edition

- Authorization Request
 - Professional/Premium edition
 - Standard edition

Table of Contents

Section 1: Permissions	1
Section 2: Overview	1
Benefits	2
Definitions	3
Understanding Groups	3
What is a Group?	4
Determining Groups in an Organization	4
Other Group Configuration Consideration	6
Other Features That Are Group Aware	7
Areas Lacking Group Awareness	8
Section 3: Configuration	8
About The Procedures	8
Access Group Configurations for Employees	9
Add Employee Group Configurations	9
Edit Employee Group Configurations	12
Delete Employee Group Configurations.....	13

Revision History

Date	Notes/Comments/Changes
February 11, 2019	Updated the copyright; no other changes; cover date not updated
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 5 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
October 27 2016	Updated the guide content to new corporate style; no content changes.
May 6 2015	Updated the screen shots to the enhanced UI; general cleanup of the content
November 30 2014	Integration Administrator has changed to Import/Extract Administrator; no other content changes
October 3 2014	Added information about the two user interfaces; no other content changes
January 23 2014	Cover and copyright changes; no other content changes
November 8 2013	The Group Configurations – Employee tab approver setting is now changed to <i>Allow employee to edit their default approver(s) in their Profile</i> for clarity
April 3 3012	Removed all references to the <i>legacy</i> Authorization Request feature in Concur Expense Changed any references to Concur's Travel Request service to Request, Concur Request, or Authorization Request, depending on the situation No other content changes
February 27 2013	Name change from "Travel Request" to "Request" – no other content changes
December 28 2012	Made rebranding and/or copyright changes; no content changes
September 2012	Move of the Allow employee to edit bank account in My Info to the Expense Tools > Payment Manager tool
February 2012	Changed copyright; no content change
February 25 2011	Original document <i>Shared: Feature Hierarchies and Group Configurations</i> is divided into this document and <i>Shared: Feature Hierarchies Setup Guide</i> .
December 31 2010	Updated the copyright and made rebranding changes; no content changes
November 2010	Added information about Feature Hierarchies in the current user interface (Expense only)
December 2009	Changed to stand-alone setup guide; no content change
April 17 2009	Added information about the Expense Cost Object Approver hierarchy
Mar. 2008 (SU29)	Changed all references of travel request to authorization request
September 2007	Add detail to field description for Create New/Edit Group Configuration page relating to Direct Reimbursement.

Group Configurations for Employees

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (view but not create or edit).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with Concur Client Support.

Section 2: Overview

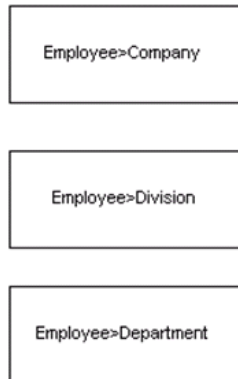
Employees in a company naturally fall into many different categories (groups or groupings). These groups might be:

- Corporate, Division, Department, Team
- Executives, Management, Non-Management
- Non-Exempt, Exempt, Contract
- Frequent Travelers, Infrequent Travelers, Non-Travelers

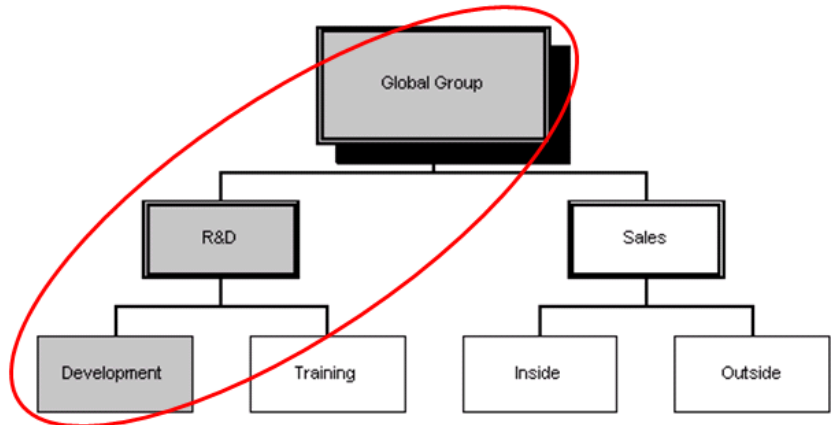
For each of these categories, a different set of policies and rules may apply. For example, executives may have a set of travel rules that allow them to fly first class, have higher entertainment budgets, and so forth. In addition, these groups may all have the same administrator to determine the policies that apply to them (a centralized model) or they may have a decentralized model for responsibility for individual groups is distributed among different administrators. Thus, companies need the ability to grant permissions to different groups.

To manage these needs, Concur uses *hierarchical groups* to categorize employees. Hierarchical groups allow companies to grant different levels of permissions for accessing data, create expense policies that flow from higher levels to lower levels, and define different sets of rules for different groups. For example, a company can create a master set of rules that can flow down from the top to the lower levels of the company, while at the same time preserving the ability to create variances for groups who may use a different set of rules.

Hierarchy Definition



Hierarchical Group (from imported list data)




Groups can be set up to include any set of employees that the company desires. Hierarchies are set up in descending order, with the highest level (Global Group) defined first and each subordinate level defined in succession. (The Global Group encompasses the entire organization.) Thus, for a company that uses a Company/ Division/Department structure, there may be one group that is called Global Group-Concur-R&D Division-Development, a name that uniquely identifies that group in accordance with the hierarchy.

The administrator sets up a general hierarchy for employees, Expense, Invoice, and Request. If other features are being used within the system, such as tax, travel allowance, and/or authorized approvers, then separate hierarchies are available to set up as well. These features use hierarchies in a manner different from how configuration features (such as Employee or Expense) use hierarchies.

Benefits

The main advantages of hierarchical groups are:

- A company can create separate hierarchies for different features.
-  Refer to *Shared: Feature Hierarchies Setup Guide* for additional information.
- Groups can be administered at any level and still have global control – a company can choose the mix of centralized and decentralized administration that works best for the organization.
- Shared data is defined only once and maintained in one place.
- Employees can belong to different groups for different features; these features can have the same or different hierarchy structures.
- Inheritance allows an administrator to define a shared configuration only once and be used by groups below if they choose. This reduces maintenance overhead for configuration data, while still allowing different parts of the organization to have specific configurations.
- A company can use flat groups or create as many levels of groups as desired.

Definitions

Term	Definition
Feature Hierarchy	<p>A feature hierarchy controls an area of functionality within Expense, Invoice, Request, etc. Some features have a hierarchy associated with it that determines the structure that defines a group of employees. For example, the Employee hierarchy controls the set of employee groups and dictates which employee form will be used by each of those groups, among other things.</p> <p>The Feature Hierarchies tool is located in Expense Admin, Invoice Admin, and Request Admin and provides a <i>shared</i> page to configure all the hierarchies.</p> <p>NOTE: Accounting Administration also uses hierarchies. However, these hierarchies are defined in the Accounting Administration tools in the Expense Admin and Invoice Admin – not in Feature Hierarchies.</p>
Hierarchy	<p>A hierarchy is an organization of items into different levels that define data relationships. A hierarchy is set up in a "tree" structure, much like an organizational chart. One item (Global Group) is at the top, with one or more items at levels below.</p> <p>Each company can have one or more hierarchies.</p>
Group	<p>A group is a set of employees who share the same data configuration, such as policy information and payment types. The top-level group is referred to as the <i>Global</i> group. Each group inherits configuration data from the group above it.</p>
Inheritance	<p>Inheritance refers to the flow of configuration data from a higher level to a lower level. For some features such as Audit Rules, the configuration data itself includes inheritance settings and determines whether that particular configuration data is inherited.</p> <p>NOTE: Inheritance may not be available for all features.</p>
Connected List	<p>Connected lists are different from standard lists because of the relationships between fields. Valid list items available for a field are filtered based on the item selected for a previous field. The list structure ensures that the employee can select only valid combinations of list items.</p>
Source List	<p>A source list provides the data that appears in the connected list and/or creates the list of valid groups that can be used with the configuration hierarchy.</p>

Understanding Groups

Before setting up hierarchical groups for the company, a few things must be determined, including understanding what a group is, and how to determine groups within the company.

What is a Group?

A group is a collection of employees that share (are subject to) the same expense policies or that must be managed by the same authority. Groups are comprised of different levels, with the *Global* group at the top and subgroups used to organize different sets of employees. Groups can be used to organize any set of employees that makes sense for the implementation. An administrator can use numerous factors to define a group, such as the following:

- **Geography:** Each country involved in the implementation could define a group.
- **Organization Units:** Specific departments or divisions could define a group.
- **Payment Types:** This allows company cards to be group-based. Although each individual card number is assigned to an individual employee, the type of card used (Amex, Visa, Lloyds Bank, and so on) is a group-based assignment.

Example: Should all United Kingdom employees be a single group? They are all in the same country, they all share the same policy, and they are all administered by the same authority; however, the employees in Northern Ireland use a different company card from that used by the employees in England. You could create a group that has United Kingdom at a higher level on the hierarchy, with Northern Ireland and England as subgroups with different company card policies.

- **Companies:** Specific companies within a global corporation of many companies could be defined as separate groups.
- **Function:** Unique job types or employee functions could also necessitate the need for a distinct group. For example, assume that you have defined a group around an organizational unit such as a Sales department. Certain individuals may need to have access to policies that the general population within Sales does not require. This could then serve as the basis for forming a subgroup.

In summary, the factors that drive policy requirements for a given set of employees are limitless. However, only two main factors determine how to define a group:

- Employees that share the same expense policies
- Employees that need to be managed by the same authority

Determining Groups in an Organization

Before the administrator starts to work with the Group Configurations tool, the administrator must take the time to evaluate the company's structure and create hierarchies on paper based on that structure that specifies different groups within the company. Generally speaking, the administrator should analyze the following:

- What are the logical divisions of employees for each of the features the company uses? For example, the structure the company uses to divide employees for Expense configuration may be different from that the company uses for Invoice. These divisions will serve as the basis of groups the administrator sets up.

- What other specific areas might create a group, such as audit rules, receipt limits, and so on, and be a factor when creating hierarchical groups?
- What data is required from each employee? What Human Resources (HR) record will be used to assign the employee to each hierarchy? For example, your HR system may contain certain data elements that you want to map the company system to. When you define the employee forms, you may do so based on the information that you know you need from your HR system.
- What fields are you going to store each data item in? For example, do you need a custom field to be defined as Division?
- What are the differentiators between different functional areas? For example, what pieces of information would Expense need that are different from Invoice? From Reporting?
- What are the cross-over points between the various data needs? For example, which employees share the same expense policies and rules? Which employees are managed by the same authority?

After the administrator has made a comprehensive analysis of the logical data points within the company, the administrator will then be ready to set up the Feature Hierarchies and Group Configurations.

As was discussed earlier, it is important that the groups be determined well in advance of their creation. The administrator should draw up a rough diagram of the different hierarchies and their levels. The following implementation example is intended to be a guide for understanding some of the considerations for grouping employees.

EXAMPLE:

A company needs to deploy Expense globally. It plans to deploy this global implementation in phases. This particular implementation involves three primary territories: North America, Latin America, and Europe. The initial phase of the global deployment involves the following: USA (North America) and France (Europe). However, when complete, the global deployment involves all of the geographic territories listed in the table below. In this example, the administrator creates a subgroup for each specific country under the level of the territory group.

Group (Territory)	Subgroup (Country)
North America	USA
North America	Canada
Latin America	Mexico
Latin America	Ecuador
Europe	France
Europe	Germany
Europe	Spain

As is the case with all global implementations, the requirements will vary from one country to the next. The first consideration for the group strategy is to recognize which data objects the administrator can leverage across multiple groups. You can:

- Have the *Global* Expense Configuration administrator create all shared configuration objects.
- Create *Group* Expense Configuration administrators that have control over more than one group.

Shared configuration objects can be defined at a high level (such as at Global Group) and be made available to lower levels, where the Group Configuration administrators can choose whether or not to use those objects.

Other Group Configuration Consideration

There is also a group configuration consideration with respect to employee administration and back-office processing of expense reports. For example, a company may utilize Global Configuration objects for all groups, but also require group-specific processing and employee administration. This will become clearer with an understanding of group awareness.

GROUP AWARENESS

There are certain types of data for which access is limited to members of the group or groups. This is referred to as "group awareness." There are a few ways of looking at group awareness:

- When a configuration administrator is working with a tool, they can edit everything defined at any group for which they have rights or any group below these groups. They can view (but not edit) any configuration data defined at groups above their right up to and including the Global Group. When an administrator is configuring settings for a group, they can see everything that is defined at the current group and defined at a group above that is allowed to inherit to the current group.
- Processors will see only reports submitted from employees who belong to the groups whose output the processors are authorized to process.
- Employee administrators can access employee data and create new employees only for those employees in the group or groups to which the administrators are assigned and those employees that are assigned to groups below these groups.

NOTE: With inheritance, if a user has a role, such as Processor for a particular group, he automatically has the same role for every group below that group.

- Expense users and approvers will see only policies, expense types, payment types, and so on, that are configured for use by their group.

NOTE: There is no inheritance of roles for end users. If configuration data is not found in their group, then it moves to the group above it to see if it exists there. If not, it continues up until the valid information is found all the way to Global Group.

The administrator must understand the difference between group awareness for the Expense/Invoice/Request user and for all of the other examples listed. For example, the Expense User is assigned to a single group, whereas group awareness for the Expense Processor or Employee administrator will depend on which groups they have been assigned to administer or process and by inheritance of roles to all groups below their groups. These group(s) could be different from the group(s) they belong to as an Expense User.

Examples

- The administrator assigns an Expense Processor to Group NA-USA and NA-CAN for processing purposes; but in their role as an Expense User, the administrator assigns this individual only to NA-USA. This processor could review reports from all users in both NA-USA and NA-CAN, but would see only NA-USA policies as an Expense user.
- The administrator assigns an Employee administrator to Group NA-CAN for employee management purposes, but to NA-USA as an Expense user. This administrator can access, add, or modify employee data for any user in Group NA-CAN or any group below NA-CAN, but not for any other group.

Other Features That Are Group Aware

The following features are group aware:

- **Audit Rules:** You can assign groups different rules or you can assign to the Global Group and have that rule apply to all groups beneath it. This is based on either the Expense or Invoice hierarchy.
- **Receipt Limit:** You can assign different receipt limits based on groups, for example, Sales>Inside Sales may have a limit of \$25 before they have to attach receipts to an expense report, but Sales>Outside Sales may have \$100. You can assign one limit to all groups by assigning a limit to the Global Group and have all groups below it inherit that limit. This is based on the Expense Reports hierarchy.
- **Payment Hold:** You can assign a payment hold configuration to place an expense report on hold and not paid until receipts are handed in for a single group, for multiple groups, or for all groups. This is based on the Expense hierarchy.
- **Car Configuration:** Car configurations are group aware but they are also determined by country, so this may not be necessary to take into account when creating groups. This is based on the Expense hierarchy.
- **Email Reminders:** When an email reminder is sent can be dependent on a group as well. This is based on either the Expense or Invoice hierarchy.

- **Delegates:** When a delegate configuration, which defines what type of actions an assistant or delegate can perform for another employee, is set up, then a group must be assigned to that configuration. This is based on the employee hierarchy.

NOTE: There are separate delegate configurations for Expense and Invoice; however, they are both based on the Employee Hierarchy.

- **Proxy Logon:** A proxy can be assigned to a specific group based on either the Expense or Invoice hierarchy.

Areas Lacking Group Awareness

There are some areas within the product that are currently not group-aware, for example, an approver can currently approve a report for an Expense user from any group. Similarly, the group to which the approver belongs does not restrict the list of approvers available to the Expense user.

Section 3: Configuration

A group is a collection of users that share the same set of policies and configuration data. Hierarchical groups are created in three steps:

1. Determine along which lines you want to divide users into groups and the data fields that differentiate users into these groups.
2. In the Feature Hierarchies section of Expense Admin, Invoice Admin, and Request Admin, you define a hierarchy for a feature and an associated source list.
3. In the List Management tool, you import the source list associated with the feature hierarchies. The process of importing this list is equivalent to creating groups since each item in the source list is in effect a group.

The Group Configurations tool is used to associate configuration data with a group, such as what employee form applies to a group and whether or not the employee form is used by the groups below (inherited.) For example, if Global Group>Sales Divisions uses the Default Employee Form and selects to have groups below it inherit that group's characteristics, then Global Group>Sales Division>Inside Sales can also use the Default Employee Form. This guide discusses this configuration.

The Group Configurations tool is not visible if you have the Shared Configuration administrator (Restricted) role.

About The Procedures

The procedures below are Expense-centric; the Invoice and Request procedural tasks are virtually identical.

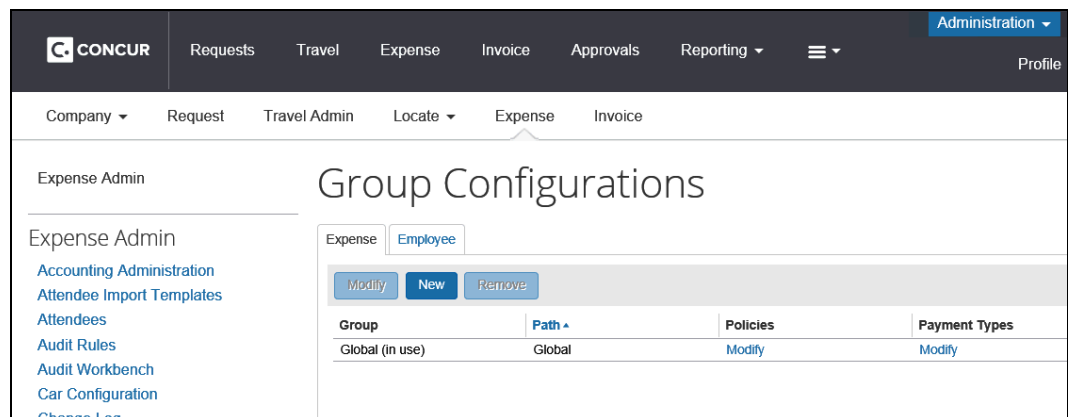
Access Group Configurations for Employees

► **To access the tool:**

1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

2. Click **Group Configurations** (left menu). The **Groups Configurations** page appears.



3. Click the **Employee** tab. The **Employee** page appears.

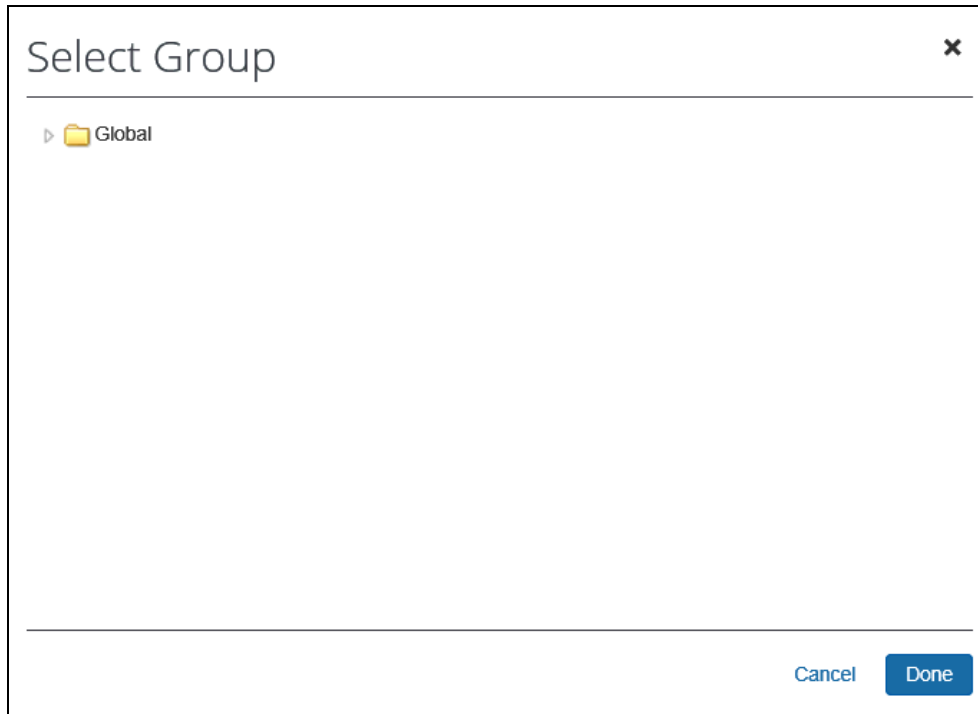


Add Employee Group Configurations

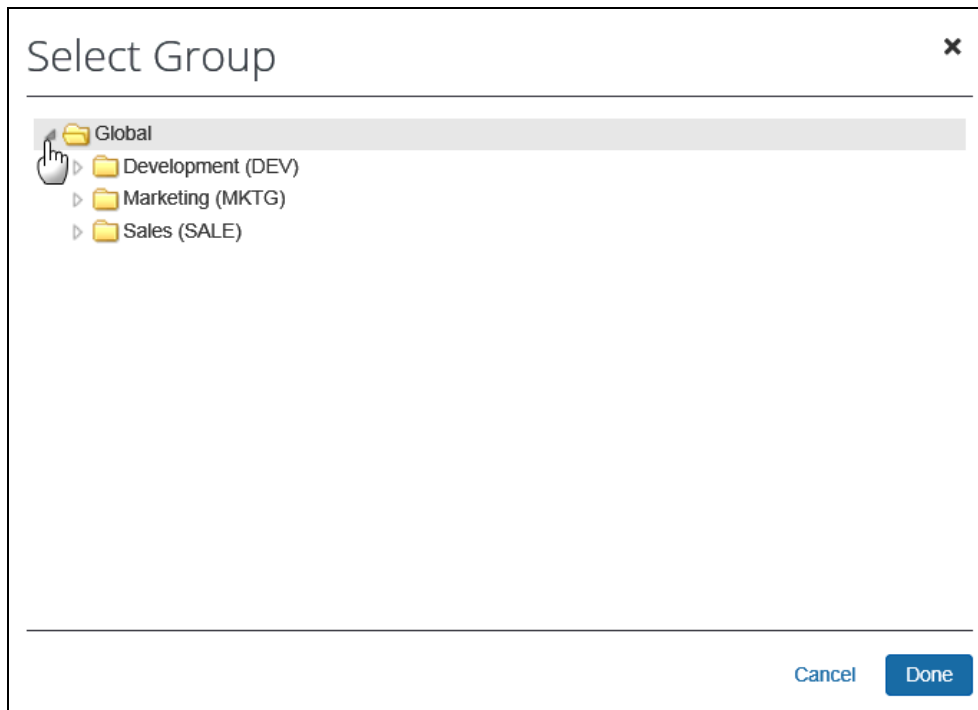
You can associate an employee form with an employee group and set a profile option.

▶ **To add a group configuration:**

1. On the **Employee** page, click **New**. The **Select Group** page appears.



2. Expand, if necessary, to see existing groups.



3. Click a group.

4. Click **Done**. The **Configuration for Group** page appears.

Configuration for Group: ✕

Group: Global-Development-Program Mgmt-Expense

Group Name:

Employee Form:

Allow employees to edit their default approver(s) in their Profile

Cancel
Save

5. Enter or select as appropriate.

Field	Description
Group	Read-only; This is the group that contains all possible inheritance values for the group you are configuring.
Group Name	Type a unique name for the group. This name will appear in other configuration areas and within the User Admin and Processor tools, so be sure to be clear on what group you are describing.
Employee Form	From the Employee Form list, select the employee form to be used by the group. This is the form that identifies the employee information that is to be captured. The employee form defines what the end user sees in Profile and other areas of the product. It also defines information that will need to be included during an employee import or completed by the Employee Admin when adding an employee.
Allow employee to edit their default approver(s) in their Profile	If cleared (disabled - the default), then the employee will not be able to change their default approver in Profile. The fields will be read-only. In order for an employee to be able to select their default approvers, then both this check box and the Allow users to select their own approver for expense reports check box (Administration > Expense > Workflows > Settings) must be selected as well.

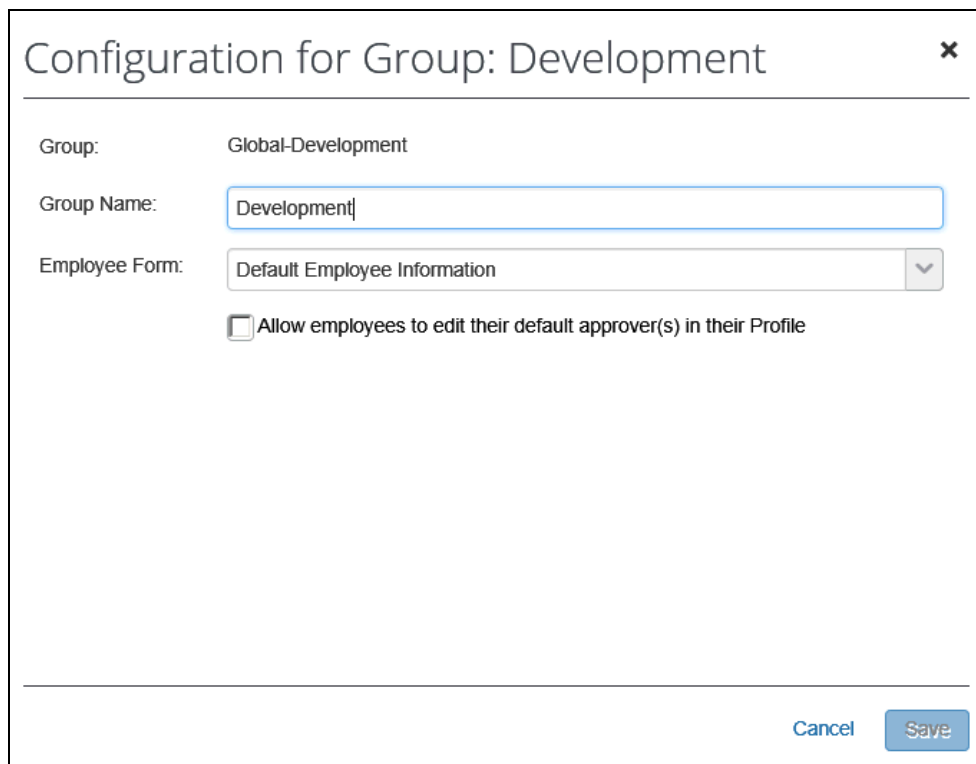
6. Click **Save**.

Edit Employee Group Configurations

▶ **To edit a group configuration:**

1. On the **Employee** page, either:
 - ◆ Click the desired group, and then click **Modify**.
– or –
 - ◆ Double-click the desired group.

The **Configuration for Group** page appears.



Configuration for Group: Development

Group: Global-Development

Group Name:

Employee Form:

Allow employees to edit their default approver(s) in their Profile

Cancel Save

2. Make any necessary changes.
3. Click **Save**.

Delete Employee Group Configurations

▶ **To delete a group configuration:**

1. On the **Employee** page, click the desired group.
2. Click **Remove**.

